

SiteManager **Training Manual**



Module A
Chapter 1

Contract Administration
Contract Records

Section A-2-8-2

Viewing Key Dates

Student's Version

Indiana Department of Transportation

May 2007, Version 3.7b

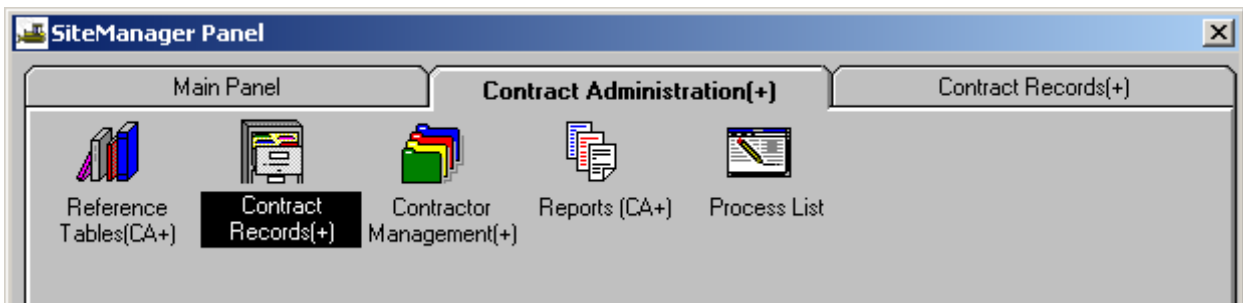
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Key Dates

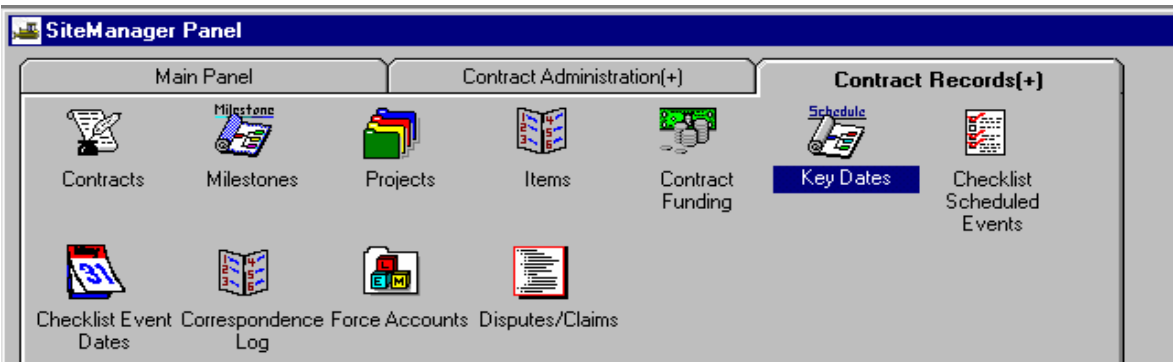
A key date is a date that occurs once in the life of a Contract.



“Double-click” on the **Contract Administration (+)** icon located on the Main Panel.



“Double-click” the **Contract Records (+)** icon.



“Double-click” on **Key Dates**.

Select Contract

Selection

Contract ID

Find :

Contract ID

Contract ID	Vendor ID	Fed State Proj Nbr	Status	County	Lvl 2	Lvl 3	Lvl 4	Location Description 1
R-90004	99-9999966	STP 3387005	ACTV	C087	660			ON SR 261 AT OA
R-90005	99-9999955	STP 3387005	PEND	C087	660			ON SR 261 AT OA
R-90006	99-9999999	STP 3387005	ACTV	C087	660			ON SR 261 AT OA
R-90007	99-9999988	STP 3387005	ACTV	C087	660			ON SR 261 AT OA
R-90008	99-9999977	STP 3387005	PEND	C087	660			ON SR 261 AT OA
R-90009	99-9999966	STP 3387005	PEND	C087	660			ON SR 261 AT OA

OK Cancel

The Select Contract window opens.

The Bottom Panel contains the following columns:

- **Contract ID:** is the identification number assigned to the contract.
- **Vendor ID:** is the INDOT assigned identification number for the Prime Contractor.
- **Fed State Proj Nbr:** is the unique identifier for the project.
- **Status:** column indicates current status of the project, Active, Pending, Complete, or Archived.
- **County:** column shows the county where the majority of the work is located.
- **Lvl 2:** The **Lvl 2** column indicates the District Office administering the contract.
- **Lvl 3:** The **Lvl 3** column is not utilized by INDOT.
- **Lvl 4:** The **Lvl 4** column is not utilized by INDOT.
- **Location Description 1:** the **Location Description 1** column is the description of the actual work location.

Use the Scroll or Find, Filter, Sort technique to locate the appropriate contract
 “Double-click” on the appropriate **Contract ID**.

This step will be skipped if a contract has previously been selected.

AASHTO SiteManager
File Edit Services Window Help

Key Dates
Contract ID: R-90006

Key Date Type	Projected Date	Actual Date	Required to Activate	Required to Finalize
Bench Marks	00/00/00	00/00/00	N	Y
Central Office Contract Review Complete	00/00/00	00/00/00	N	N
Contractor Last Day of Work	00/00/00	00/00/00	N	Y
District Contract Review Complete	00/00/00	00/00/00	N	N
Final Acceptance Date	00/00/00	00/00/00	N	Y
First Day of Work	09/24/05	00/00/00	N	Y
Overhead Structure Report	00/00/00	00/00/00	N	Y
Payrolls	00/00/00	00/00/00	N	Y

Key Date Type: Bench Marks
 Projected Date: 00/00/00
 Actual Date: 00/00/00
 Distribution List:
 Message Text:
☐ Required to Activate
☒ Required to Finalize
 Recipient:

The Key Dates window lists the Key Dates for the selected Contract in the top panel. The data for the selected Key Date is displayed in the bottom panel.

AASHTO SiteManager
File Edit Services Window Help

Key Dates Close
Contract ID: R-90006

Key Date Type	Projected Date	Actual Date	Required to Activate	Required to Finalize
Bench Marks	00/00/00	00/00/00	N	Y
Central Office Contract Review Complete	00/00/00	00/00/00	N	N
Contractor Last Day of Work	00/00/00	00/00/00	N	Y
District Contract Review Complete	00/00/00	00/00/00	N	N
Final Acceptance Date	00/00/00	00/00/00	N	Y
First Day of Work	09/24/05	00/00/00	N	Y
Overhead Structure Report	00/00/00	00/00/00	N	Y
Payrolls	00/00/00	00/00/00	N	Y

Key Date Type: First Day of Work
 Projected Date: 09/24/05
 Actual Date: 00/00/00
 Distribution List:
 Message Text: Enter Actual Date in Critical Dates
☐ Required to Activate
☒ Required to Finalize
 Recipient: ccjolly

Projected Date: The **Projected Date** is the date the key date is targeted to occur.

Required to Activate: **Required to Activate** indicates that the Key Date was required to be populated when the contract was activated within SiteManager.

AASHTO SiteManager
File Edit Services Window Help

Key Dates [Close]

Contract ID: R-90006

Key Date Type	Projected Date	Actual Date	Required to Activate	Required to Finalize
Bench Marks	00/00/00	00/00/00	N	Y
Central Office Contract Review Complete	00/00/00	00/00/00	N	N
Contractor Last Day of Work	00/00/00	00/00/00	N	Y
District Contract Review Complete	00/00/00	00/00/00	N	N
Final Acceptance Date	00/00/00	00/00/00	N	Y
First Day of Work	09/24/05	00/00/00	N	Y
Overhead Structure Report	00/00/00	00/00/00	N	Y
Payrolls	00/00/00	00/00/00	N	Y

Key Date Type: First Day of Work

Projected Date: 09/24/05

Actual Date: 00/00/00

Distribution List:

Message Text: Enter Actual Date in Critical Dates

☐ Required to Activate

☒ Required to Finalize

Recipient: ccjolly

Actual date: The **Actual date** the date the event actually occurs.

Required to Finalize: **Required to Finalize** indicates that the Key Date is required to be populated before the contract can be finalized within SiteManager.

Distribution List: will not be utilized by INDOT

Recipient: The **Recipient** is the User ID of a person to be notified that the event has occurred.

Message Text: **Message Text** is a message that is sent to the Recipient when the Actual Date is populated.

“Click” the **Close**  button located on the toolbar.

A-8-2 Group Exercise

What is the First Day of Work for Contract R -90006?

Double-click on Contract Administration

Double-click on Contract Records

Double-click on Key Dates

Click Open

Double-click R -90006

Select Key Date First Day of Work

Click Close

Trainer's Note: 9/24/05.
